IDR302 – Remote Customer Service Telephony

Project Brief V2.0

Date 17/4/21

Document Sign-off

Name	Role	Date signed off
Anthony Weir	Project Sponsor	1 / 4 / 21
David Graham	Service Owner	
Morna Findlay	Project Manager	1 / 4 / 21
Maurice Franceschi	Programme Manager	
Vladimir Zirojevic	Senior Supplier desktop applications	
Eileen Mullan	Senior User	17/4/21

Working draft should be version 0.x and 1.x
Draft sent for Approval/Review should be version 2.x
Approved Project brief should be 3.0
Post-approval changes should be change controlled via Issue Log and Scope Change Page, and version 3.x

Background

The *digital pivot* required to support hybrid working during the pandemic saw a rapid transition from face-to-face meetings and telephone calls to online digital communication using services such as Microsoft teams and Zoom. These have worked well in supporting our internal business meetings and in supporting students in online learning but are not methods which allow the public, parents or other external parties to contact the University through the phone.

This project will investigate and deliver a solution to ensure that telephone customer services can be provided by staff who are currently working remotely. Although the service will be advertised as available to all staff, this project will prioritise delivering to external public-facing telephone numbers.

Scope

- Understand nature of the service we will offer to customer service "Helplines" and any constraints

- Light touch review of which customer-service teams require ongoing public facing telephony
- Capture appropriate data to help guide service provision
- Additional required technical development
- Publish appropriate guidance for staff
- Communications with stakeholder groups
- Investigation of future integration of remote telephony with MS Teams

Changes to Scope will be logged on the Issue Log and also recorded on the Project Scope Change page.

Out of Scope

- Management of delivery of remote telephony service to non-customer service numbers
- Management of customer service Helplines
- Provision of consumables such as headsets
- Implementation of integration of remote telephony with MS Teams
- Management of long-term changes to University working practices

Any significant work we need to explicitly state we are not doing (that some stakeholders may assume or expect that we will).

Objectives and Deliverables and Success Criteria

Summarise - What we are aiming to do and deliver, by when.
What are we aiming to ultimately deliver that will be key to the measure of the success of this project - but potentially any significant other things along the way (that may outlive the project).
What are our objectives and what deliverables are part of them.
Driven by the Deliverables and Objectives. Do we have objective measures that we can point to to say the project has been a success (typically we said we would deliver X and we have).

Unless otherwise indicated, the deliverables are a success when accepted by the Project Sponsor and the Service Owner.

	Description of the Objective	Success Criteria
	Description of the Deliverables needed to achieve the objective	
Objective 1	Understand nature of the service we will offer	
Deliverable D1.1	Identify customer-service owner stakeholders	List of main existing customer service helplines
Deliverable D1.2	Describe and communicate capabilities of proposed solution for the customer-service owner audience	Document for customer service stakeholders and senior user
Objective 2	Capture appropriate data to help guide service provision	

Deliverable D2.1	Analysis of a use case for a customer service completed	Description of business requirements gained from liaising with stakeholders
Deliverable D2.2	Determine which customer service lines have been receiving unanswered calls	Available data extracted.
Deliverable D2.3	Confirm number of in-scope customer-service Helplines and numbers of staff answering calls	List of main existing customer service helplines
Objective 3	Deliver solution to allow remote operation of telephone Helplines	
Deliverable D3.1	Review and report on any security and operational issues associated with preferred solution	Document known security issues, risks and solutions.
Deliverable D3.2	Preferred solution confirmed	Document recommended solution(s) for stakeholders
Deliverable D3.3	Preferred solution configured, packaged and available for local install	Solution(s) packaged
Deliverable D3.4	Preferred solution tested by early adopters	Successful testing completed.
Deliverable D3.5	Deployment plan for preferred solution approved	Plan approved
Deliverable D3.6	Service Handover Checklist Completed	Checklist completed
Objective 4	Provide Guidance for Staff	
Deliverable D4.1	Update and/or create documentation re use of mobile phones for business use	Documentation signed off by senior user and published
Deliverable D4.2	Update and/or create documentation for updating staff phone voicemail messages	Documentation signed off by senior user and published
Deliverable D4.3	Update and/or create documentation for softphone users and customer-service helpline managers	Documentation signed off by senior user and published
Deliverable D4.4	Review and update service support documentation for ISG Helpline staff	Documentation signed off by ISG helpline
Objective 5	Investigate integration of remote telephony with Teams	
Deliverable D5.1	Investigation of integration of remote telephony with MS Teams	Investigation completed
Deliverable D5.2	Proposal for future integration of remote telephony with MS Teams including initial estimates of costs	Proposal accepted.

This table can be used through Business and Technical Analysis, Design, Build, and Testing/UAT as a Traceability Matrix to ensure the project brief project objectives and deliverables are followed through.

Requirements

Which deliverables will fully or partially satisfy the requirement?

Requirements are aligned with objectives and deliverables, and also the opportunity to realise the benefits.

	User/Owner	MoSCoW	Set By
Provide solution to allow staff working remotely to answer telephone calls to customer support/Helpline	David Graham	M	Project Sponsor
Solution allows set up of must-have customer-service helpline requirements	David Graham	M	Project Sponsor
Provide user documentation to staff using solution	David Graham	M	Project Sponsor
Solution can be used by staff for answering calls to their own individual numbers	David Graham	S	Project Sponsor
Solution should be low cost or no cost	Tony Weir	S	Project Sponsor
Solution should allow retention of some working office phones	David Graham	S	Project Sponsor
Understanding of how telephony might be integrated with MS Teams	Tony Weir	C	Project Sponsor

Benefits

The benefits that the deliverables will enable or act as a catalyst in making happen. These benefits may be immediate or may be realised after the project has closed.

1. Customers will be able to contact advertised Helpline numbers
2. Inappropriate calls to Helpline will be reduced
3. Calls can be answered in a timely fashion by the right team
4. Staff will be able to answer telephone calls to their own advertised numbers
5. Planning for future integration of Telephony with MS Teams will be informed

Governance
Project will have these governance roles by default. Delete/Add/Change as appropriate.

Portfolio Governance

Role	Name	Division / Group / Team / College / School and Title
Project Sponsor, Programme and Portfolio Owner	Anthony Weir	ITI Director
Portfolio Manager	Maurice Franceschi	ITI
Service Owner	David Graham	ITI CIS

Project Board - not required

Tolerances

For medium and large projects, state any tolerances for budget/timeline/scope beyond which point the Project Manager must request approval of the change from the Sponsor and / or the Board. For all projects, check if there is a tolerance on budget/timeline/quality for escalating to programme/portfolio manager.

Resources Skills and Cost

Budget

Build:
CIS: 50 days
DST: XX Days

Project Management: 50 days

Priority and Funding

Check the Forward Look and Annual Plan on ITI Sharepoint to see the project's priority within programme and portfolio (and reflect this also on the project info section of the website). Confirm that we have funding for this project.

Project Team

The project team: who manages the team, lead and other technical people, business analysts, lead and other representatives, people in other areas of the University who will be involved in analysis, testing, acceptance and service handover.

Role	Name	Division / Group / Team / College / School and Title
Project Manager	Morna Findlay	ITI Project Services

Solution Architect	David Graham	ITI CIS
Technical Expert	Vlad Zirojewic	ITI DST
Testing, Contributor	Fraser Muir	CAHSS
Service Development	Alan Rae	ITI CIS
Communications Assistance	Shaun Burnett	Is Communications

Quality of Project and Deliverables / Key Project Milestones

The milestones are a key tool in ensuring that the project process itself is followed as set out by ITI, and that the product deliverables are to the required Quality.
Edit this template to list the key Milestones and who signs off on these milestones. Add milestones for Security, Accessibility, UX, as required.
For medium and large projects, a project plan - MS Project, Gantt, or other - can be added to the Plan Log and revised as project progresses. The approach can be stated here.
You can also mention the approach the project is taking to set, measure and confirm the quality of the deliverables

Milestone	Sign-Off means	Date of Milestone		Who signs-off (Accountability)
Start of Project	Project can begin, is in line with Programme and Portfolio priority, has resource	11/12/2020		Sponsor, Programme Manager, Senior Supplier
End of Planning	Project can begin, is in line with Programme and Portfolio priority, has resource			Sponsor, Project Manager, Programme Manager, Senior Supplier, Senior User
End of Analysis	Light touch analysis report delivered			Sponsor, Project Manager, Senior Supplier
End of build	Solution ready for testing by early adopters			technical lead / senior supplier /PM
EqIA	For new services or services undergoing substantial change, there must be an Equality Impact Assessment completed, validated by equality office and deposited on eqia website			PM/ Service Owner / Equality Officer
DPIA	Check if your project needs to undergo a Privacy Impact Assessment			PM / Service Owner / CISO
Acceptance	overall quality of deliverable acceptable, UAT has been passed, Integration testing successful, all components technically checked -fit for delivery to live service			technical lead / senior supplier /business lead / senior user /PM
Delivery	Change to Service can proceed	15 Jul		Sponsor, PM service owner/ service operations manager (helpline)
Handover to Support	Support can take over running of the Service			service owner/ service operations manager (helpline)

Analysis (of telephony integration with MS Teams)	Report delivered to inform future projects			Project Sponsor, Senior Supplier, PM
Closure	Project can close	28 Jul		Sponsor, PM

Assumptions

What are the key underlying assumptions for the project that underpin the planning? For example, that the requirements we have outlined are complete, that all our stakeholders have been identified, that the software we are using is ready and configured, that we have a ready to use TEST environment.

1. That the solution already delivered for the Switchboard and IT Helpline will be appropriate
2. That the customer service owners will manage the take-up by their own staff
3. That the packaged solution can be deployed to managed desktops and laptops via SCCM
4. That the solution can be delivered to non-managed devices (such as users' home laptops) in a user-friendly way without requiring CO involvement
5. That the solution will work for Helpline staff who are currently accessing university services on office devices via RDP.
6. That the solution will work in a hybrid environment where some users are working remotely and others on-site
7. That the user documentation delivered will be sufficient and training will not be required.

Constraints

Are there constraints on this project? For example, specialist skills are needed, having to deliver in certain windows through the academic year, we need to share a TEST environment with other developers?

- The Project Sponsor has indicated that the service should be delivered to some users in January
- There is currently no funding available for additional costs such as additional licences

Risks

The project manager will ensure that the project team will review the risk log at every team meeting, and project owners update their risks at least once a month or more as appropriate to the project.

https://secure.projects.ed.ac.uk/unpublished/project/idr302/risks

Issues

The project manager will ensure all changes to cost/timeline/scope must be recorded in the issue log, and reflected in milestones log, budget and estimations, and the project Scope Change log.

https://secure.projects.ed.ac.uk/unpublished/project/idr302/issues

Previous Lessons Learned

Add lessons learned from rollout to Helpline here

Dependencies

Are there other projects or work that this project is dependent on to start or possibly interact with at a later stage - or vice-versa that depend on this project.

Are we depending on certain events to take place?

Are we dependent on suppliers, or product releases?

Communication

For projects with an array of external stakeholders, a Communication Plan can be created and made available on the ITI Sharepoint space if preferred.

Also confirm that :

Project Sponsor and Project Manager meeting schedule has been agreed with Sponsor.

Project Team meetings schedule has been arranged (these may be combined with Sponsor meetings).

Check the ITI Annual Planning Engagement with Stakeholders on ITI Sharepoint to see the level of engagement our partners expect for your project

Check the ITI Forward Look to see if your project will be using the Major Governance Toolkit.

Run / Grow / Transform

Which activity does the project contribute to? The project could be one or more of R/G/T

Alignment with Strategic Vision

*This project will deliver benefits, change and innovations in alignment with the IS Strategic Vision and the University's Strategic Vision for 2025. ** Check the Annual Plan on ITI Sharepoint to see how the project's deliverables and benefits have been aligned to Run/Grow/Transform and the Strategic Themes ***

Student Experience	Commentary
Student experience and the unique Edinburgh offer	Students and families better able to engage with customer support
Online and distance learning leaders	Students and families better able to engage with customer support
Library national and international leadership	
Research and Innovation	
Research IT and Data Sciences	
Innovation	
Collaborative leadership and social responsibility	
Service Excellence	
Process improvement, efficiency, quality and best practice	Students and families better able to engage with customer support
Long-term IS strategic planning and linked professional services	Information gathered re integrating Telephony with Teams
Information Security	

University's Strategic Vision for 2025 the main elements of the vision that this projects contributes have a commentary.

Vision Themes	Commentary
A unique Edinburgh offer for all of our students	
all of our undergraduates developed as student/ researchers with clear, supported pathways through to Masters and PhD	
all our students offered the opportunity to draw from deep expertise outside their core discipline	
a highly satisfied student body with a strong sense of community.	Students and families better able to engage with customer support
Strong and vibrant communities within and beyond the University – making the most of our unique offer of world-leading thinking and learning within one of the world's most attractive cities	
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A larger, more international staff who feel valued and supported in a University that is a great and collegial place to work, develop and progress	
More postgraduate students – underpinned by the best support in the sector to ensure we attract the brightest and best regardless of ability to pay	
A strong culture of philanthropic support focussed especially on our students and on outstanding research capabilities.	
Many more students benefiting from the Edinburgh experience (largely or entirely) in their own country – supported by deep international partnerships and world-leading online distance learning	
Sustained world leading reputation for the breadth, depth and interdisciplinary of our research supported by strong growth in research funding and strong international partnerships – drawing from well-established and less well developed sources An estate that matches expectations, responds flexibly to changing student and staff needs, and showcases the University	
A deeper and earlier collaboration with industry, the public sector and the third sector – in terms of research; knowledge exchange; and in giving our students the best possible set of skills for their future	

IS Change Programme - How will this project's Deliverables and Benefits promote the Themes
Indicate if the project deliverables and benefits contribute to the themes with the IS Change Programme.

IS Change Programme Theme	How the project deliverables and benefits contribute to change
Project Management	
Working Together	
Standards and Technical Leadership	Information gathered re future integration of Telephony with MS Teams
Staff Learning and Development	
Service Based Culture	Students and families better able to engage with customer support
Equality and Diversity	
Partnerships and Philanthropy	
Flexible Resourcing	
Communication and Branding	

Service Excellence - Information and Security

Service Excellence - Process Improvement, efficiency, quality and best practice (Social Responsibility and Sustainability)

Digital Transformation

Project Sponsor – Project Responsibilities

The sign-off milestones are associated with specific responsibilities of the Sponsor role.

This sets out the Sponsor responsibilities on this project - please review and amend as appropriate for this project and agree with Sponsor

Start of project – Explicitly Included in the Initiation Milestones Sign-Off
1. Negotiates and confirms funding for the project
2. Ensures the project is in line with organisational strategy and priorities
3. Chairs the project board, appoints its members and ensures they are effective
4. Advises the project manager of protocols, political risks, issues and sensitivities
5. Makes the project visible within the organisation

End of Planning – Explicitly Included in the Planning Milestone Sign-Off
1. Works with the project manager to develop the Project Brief
2. Ensures a realistic project plan is produced
3. Sets tolerance levels for escalation to themselves and to the project board
4. Ensures that project team have representation and engagement from users and suppliers
5. Helps identify Stakeholders
6. Approves Communication Plan
7. Agrees on frequency of meetings with Project Manager
8. Agrees of frequency of meetings with Project Team
9. Agrees on milestones and who signs-off

Development / Execution – ongoing
1. Provides strategic direction and guidance to the project manager as directed by the Board
2. Approves changes to plans, priorities, deliverables, schedule
3. Encourages stakeholder involvement and maintains their ongoing commitment
4. Chief risk taker
5. Makes go/no-go decisions
6. Communicates change in organisational structure, priorities, business benefits or funding
7. Helps the project manager in conflict resolution
8. Helps resolve inter project boundary issues
9. Gains agreement among stakeholders when differences of opinion occur
10. Assists the project by exerting organisational authority and the ability to influence

Delivery – Explicitly Included in the Delivery Sign-Off
1. Ensures that Service is ready for change

Closure - Explicitly Included in the Closure Milestone Sign-Off

1. Helps with publicity for the change delivered
2. Ensure that benefits will be managed, measured and realised post-project
3. Evaluates the project's success upon completion